**Planning Phase User Story 1 –**

**As an external user, I want to receive personalized financial insights based on my spending habits so that I can make better financial decisions.**

* This user story targets external customers who want to improve their financial management.
* External customers want the AI-based personal financial advisor to analyze their spending habits and provide tailored financial advice and insights.
* The main benefit of this user story is that external customers will receive actionable insights without needing to manually analyze their financial data, making it easier for them to save, invest, and manage their finances effectively.

**Linked Tasks**

* Data Integration for user financial data.
* AI model training to analyze spending habits.
* Development of the recommendation engine.

**Estimation of Effort**

* High

**Acceptance Criteria**

* Given that I am an external customer, when I input my financial data (or link my financial accounts), then the AI should analyze my spending habits and provide insights and recommendations.
* Given that I am an external customer, when I receive personalized financial advice, the advice should be clear, actionable, and based on my spending patterns.
* Given that I am an external customer, when I follow the financial insights provided, I should be able to track progress and improvements in my financial health through the application.

**Sprint1 User Story: -**

**As a user, I want the homepage to load when I open the site, and I want to navigate to the dashboard where I can see the layout for Income, Stocks Budget, and Stocks tabs**

* **This user story targets registered users who are navigating the web application.**
* Users want to seamlessly access the homepage upon opening the site and navigate to a pre-set dashboard layout that organizes financial management areas.
* The main benefit of this user story is that users will have a clear and structured interface from the start, even if the detailed functionality for the Income, **Stocks**Budget, and **Stocks tabs.**
* **Data is inserted and visualised.**

### **Linked Tasks**

* TBD

### **Estimation of Effort**

* Medium

### **Acceptance Criteria**

**1.     Homepage Loading:**

* + **Given** that I am a user,  
    **When** I open the web application in my browser,  
    **Then** the homepage should load without any errors, displaying the main navigation options including a link to the dashboard.

**2.     Dashboard Navigation:**

* + **Given** that I am a user on the homepage,  
    **When** I click on the "Dashboard" link or button,  
    **Then** I should be taken to the dashboard page without any errors.

**3.     Dashboard Layout Display:**

* + **Given** that I am on the dashboard page,  
    **When** the page loads,  
    **Then** I should see a layout with clearly labeled tabs or sections for Income, **Stocks**Budget, and **Stocks**, and CRUD Applications

### **Negative Acceptance Criteria**

1. **Error-Free Navigation:**
   * **Given** that I am a user,  
     **When** I navigate from the homepage to the dashboard,  
     **Then** I should not encounter any errors such as broken links, missing resources, or page load failures.

### **Sprint1 User Story 2 -**

**As an external user, I want to log in using my Google account so that I don’t have to create a new account.**

* **This user story targets external customers.**
* External customers want to use their existing Google account credentials to log in to the web application.
* The main benefit of this user story is that external customers will not have to create a new account or need to remember a new pair of credentials to use the web application. This would also lower the barrier to entry of the web application and make the login process more seamless for external users.

### **Linked Tasks**

* Redirects to the Dashboard page for successful authentication

### **Estimation of Effort**

* Normal

### **Acceptance Criteria**

1. **Google Sign-In Option:**
   * **Given** that I am an external customer,  
     **When** I click the "Sign in" button,  
     **Then** I should be given the option to log in using my Google account.
2. **Successful Google Authentication:**
   * **Given** that I am an external customer,  
     **When** I enter my valid Google account and password credentials,  
     **Then** I should be logged into the application and taken to the main landing page.
3. **Session Handling After Browser Closure:**
   * **Given** that I am an external customer who has already logged in,  
     **When** I close my browser tab and open the web application in a new tab,  
     **Then** the web application should require me to sign in again.

### **Sprint2 User Story -**

**As a user, I want to click on the Income, Budget, and Expenses tabs in the dashboard so that I can insert my financial data.**

* **This user story targets registered users of the application.**
* Users want to manage their finances by entering income, budget, and expenses data directly into the application through the dashboard.
* The main benefit of this user story is that users will have an organized and centralized place to input their financial data, helping them better manage their finances within the application.

### **Linked Tasks**

* After successful completion of data insertion, visualization of expenses and recommendation is produced.

### **Estimation of Effort**

* Hard

### **Acceptance Criteria**

1. **Income Tab Data Entry:**
   * **Given** that I am a logged-in user,  
     **When** I click on the "Income" tab in the dashboard,  
     **Then** I should be able to see a form or input fields to enter my income data and save it.
2. **Budget Tab Data Entry:**
   * **Given** that I am a logged-in user,  
     **When** I click on the "Budget" tab in the dashboard,  
     **Then** I should be able to see a form or input fields to enter my budget data and save it.
3. **Expenses Tab Data Entry:**
   * **Given** that I am a logged-in user,  
     **When** I click on the "Expenses" tab in the dashboard,  
     **Then** I should be able to see a form or input fields to enter my expenses data and save it.

### **Sprint3 User Story -**

**User Story Title: Personalized Stock Recommendations**

**As a** user,  
**I want to** receive personalized stock recommendations based on my financial data and preferences,  
**so that** I can make informed investment decisions tailored to my financial situation and goals.

**This user story targets** registered users who have input their financial data and preferences into the application.  
**Users** want to leverage the AI algorithms to receive personalized stock recommendations, required solutions, and predictions to guide their investment choices.  
**The main benefit** of this user story is that users will receive customized investment advice that considers their unique financial data and preferences, helping them make better-informed investment decisions.

**Linked Tasks:**

1. Develop and integrate AI algorithms for stock recommendations.
2. Create user interface elements to display recommendations and predictions.
3. Implement backend processes for processing financial data and generating recommendations.
4. Research and analyze the limitations of the AI algorithms and refine them accordingly.

**Estimation of Effort:**

* Hard

**Acceptance Criteria:**

1. **Personalized Recommendations Display:**
   * **Given** that I am a logged-in user who has entered my financial data and preferences,
   * **When** I navigate to the "Recommendations" section in the dashboard,
   * **Then** I should see personalized stock recommendations, including suggested stocks, predicted performance, and relevant financial metrics based on my data.
2. **Prediction Analysis:**
   * **Given** that I am a logged-in user who has received stock recommendations,
   * **When** I view the prediction analysis section,
   * **Then** I should see an analysis of predicted stock performance, including potential risks and opportunities based on my financial profile and market data.
3. **Error Handling and Notifications:**
   * **Given** that there is an issue with generating recommendations or predictions,
   * **When** an error occurs,
   * **Then** I should receive a clear notification about the issue.